

16 July 1962

**RECORDS MANAGEMENT OFFICER**

**ANNUAL REPORT**

**FISCAL YEAR 1962**

A. On 7 August 1961, this Records Management Officer reported for temporary duty to the Executive Office, Office of Security. On 7 June 1962, the Director of Security requested the assignment be made permanent and the DDS approved. During the year, the following notable Records Program accomplishments were completed by the Records Management Officer:

**1. Completed Seven Major Records Surveys -**

- a. Recurring Reports (Officewide).
- b. Office Files (Alien Affairs Staff).
- c. Operations Files (DPD/Security Office).
- d. Case Processing Flow (Three Divisions).
- e. Copy-Making Machines (Officewide).
- f. Reference Workload (Three Special Clearance Offices).
- g. Case Processing Forms (Three Divisions and 270 Forms).

**2. Completed Actions on One Hundred Thirty Office Forms -**

- a. Cancelled 28 forms having an annual print of 350,000 copies. ✓
- b. Revised 18 forms for greater efficiency and speed. ✓
- c. Created 45 new forms to satisfy new requirements. ✓
- d. Reprinted 39 existing forms after review of need and supply. (This continuing forms analysis and control involved more than two and a quarter million copies). ✓

**3. Controlled Supply and Use of Record Keeping Equipment Officewide -**

- a. Reviewed and approved requisitions for 43 pieces of records keeping equipment.

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- b. Made substitute proposals that eliminated procurement requests on 5 pieces of equipment valued at \$2,600. ✓
- c. Relocated three copy-making machines in Division offices for greater overall efficiency. ✓
- d. Arranged the transfer of two flexowriters from Office of Personnel to the Technical and Records Divisions, thus saving an Office of Security budget expense of \$9,000. ✓
- e. Obtained the loan of five pieces of sorting equipment from local vendors for testing in various offices.
- f. Completed the physical inventory of all records equipment in the Office of Security.

**4. Developed Three Improved Records Keeping Systems -**

- a. Revised a card file system on guards for the Building Security Branch. Eliminated need for one \$440 Kardex Card safe. ✓
- b. Assisted in developing new system for Receptionists which required new machines, forms, and procedures. Visitors are processed in and out faster, three forms were eliminated, and the visitor reporting procedure improved to eliminate two retypings of the names.
- c. Developed new Index File system for the Special Clearance Security Control Center. Arranged method to consolidate their three office files into one.

**5. Increased Records Disposition Activity -**

- a. Promoted, reviewed, and approved the transfer of more than 350 cubic feet of inactive records to the Records Center, thus making available safes and shelves valued at about \$4,000. ✓

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- b. Encouraged, reviewed, and approved the destruction of about 200 cubic feet of obsolete work papers and supplies occupying office file equipment. ✓

6. Continued the Vital Records Updating Program -

Assisted in the semiannual updating of the Office of Security Vital Records on microfilm in the Records Center.

7. Promoted Increased Knowledge of Records Management for More Than 45 Officials and Personnel in the Office of Security -

- a. Arranged for 22 clericals and secretaries to attend a three-hour Workshop on retiring office records to the Records Center.
- b. Arranged for 17 office personnel to visit the Records Center for a briefing and tour
- c. Arranged for five Office of Security officers to visit the Records Center and be briefed on the procedures related to their inactive and vital records.
- d. Escorted a total of 18 officers on seven visits to examine or confer on equipment and procedures for possible adaptation in the Office of Security.
- e. Arranged for nine Office of Security officers to attend a two-hour Workshop on the Agency Vital Records Program.

(This training and increase of "records consciousness" is an essential foundation to the records management plans for next year).

- f. This Records Officer completed two more semesters of graduate study in Public Administration at American University. He also completed two one-week seminars in Automatic Data Processing.

B. Plans for the next year include:

- 1. Records Management surveys as requested by the Director of Security.

2. Complete analysis of the 54 remaining Agency forms used in the Office of Security.
3. Continue office-wide forms improvement and elimination of "bootleg" forms.
4. Resumption of Reports Analysis in Divisions.
5. Analysis and improvement of systems and procedures in the Special Clearance Security Control Center.
6. Tighter control of Records equipment procurement.
7. Review of files systems in various offices.
8. Updating of the Offices' Records Control Schedule.
9. Updating of the offices' Vital Records Schedule.
10. Conduct training sessions in files systems, equipment, and procedures for office personnel.
11. Arrange for Workshops on forms improvement for office personnel.
12. Development of a Records Management "Self-Sufficiency" in each Division and Staff.

C. Problem Areas:

1. Updating of the Records Control Schedule and Vital Records Schedule are priority considerations for greater office efficiency and emergency preparations.
2. The more than 400 forms used in the Office of Security require continued control and improvement. The offices concerned need more training in this activity in order to improve their own procedures and operations.



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